

PeopleSoft Termination Checklist HR/Payroll/Benefits

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This checklist highlights the Menu Items, Components, and Pages necessary for basic initial processing. The checklists focus on the most common general situations. For specific detail see relevant manual.

HR/Payroll Checklist for Termination

HR: (Navigation: Administer Workforce> Administer Workforce (GBL)> Use>Job Data)

Termination (work location tab)

- Insert an effective dated row **(day after last day worked)**
- Enter appropriate Action
- Enter appropriate Reason
- Save!

Payroll:

(Navigation: Compensate Employees> Maintain Payroll Data (US)> Use>Direct Deposit)

The Suppress DDP Advice Print box needs to be unchecked upon termination. The employee will then receive a printed DDP Advice.

Add an effective dated row
(1st day of the termination month)
Uncheck the box for
Suppress DDP Advice Print

Benefits Administration:

For specific detail, see Benefits Administration Manual, or Event Maintenance Exercises in Benefits Administration Manual.

1. **Verify BAS Activity** (navigation: Compensate Employees>Administer Automated Benefits>Use>BAS Activity).
2. **Assign events to a schedule** (This is a centralized activity run by NDPERS a minimum of three times per day.)
3. **Validate Process Status and Prepare for Finalization** (navigation: Compensate Employees>Administer Automated Benefits>Use>Event Status Update or processing Controls Update).
4. **Finalize/enroll** (navigation: Compensate Employees>Administer Automated Benefits>Process>Run Control).
5. **Verify Base Benefits Termination** (navigation: Compensate Employees>Administer Base Benefits>Use {health plans, life and add, leave plans, etc.})